

Solicitation Number 05-0002-09
Scientific & Technical Functional Area
Management Support Service for the Office of Naval Research, Chief Information Office

The statement of work, order information, proposal submission requirements, and evaluation information are set forth below. Proposals from holders of ONR Multiple Award Contracts (MATOC) for support services under CLIN 0002 - Business and Financial Support Services are due by 2:00 PM (local), Tuesday, 22 March 2005.

1.0 Background

The Office of the Chief Information Officer, ONR BD06, has a requirement for management services supporting the Science and Technology (S&T) Functional Area in implementing the Functional Area Manager (FAM) and Functional Data Manager (FDM) Legacy Application/Database Rationalization initiative in conjunction with the Navy's migration to the Navy Marine Corps Intranet. The Department of the Navy (DoN) is continuing the process of Legacy Application/Database Rationalization. In order to support the S&T FAM/FDM in this endeavor, support services are required from a contractor that has the knowledge and understanding of the business rules, processes, and tools currently being used. The tasks required for this effort have been mandated by the Vice Chief of Naval Operations (VCNO). This requirement is in accordance with the VCNO's stated goal of reducing the legacy application count by 95% and with Director, Navy Staff (DNS) requirements and FAM/FDM milestones.

2.0 Statement of Work

2.1 Objective

The tasks required for this effort as mandated by the VCNO to accomplish the goal of reducing the legacy application count by 95% and are in accordance with Director, Navy Staff (DNS) requirements and FAM/FDM milestones. They include Portfolio Management; Business Case Analysis (BCA) Execution; Migration Tracking; FDM Support; FAM/FDM Coordination; and Other Agency Coordination.

2.2 Scope

The scope will consist of providing assistance to the S&T FAM in managing the S&T portfolio; participating in the development of business case analysis; developing and executing a Migration Plan tracking process; assisting in the identification and definition of authoritative databases; ensuring Legacy Application/Database Rationalization efforts within the S&T community proceed smoothly and without interruption; and participating in meetings.

2.3 Technical Tasks/Requirements

Specific tasks to be accomplished by the contractor include:

2.3.1 Portfolio Management. The contractor shall assist the S&T FAM in managing the S&T portfolio in the DON Application & Database Management System (DADMS). Support for this task will include:

- Reviewing application information and descriptions for the 500+ S&T applications currently within the portfolio to ensure applications are correctly placed in the S&T taxonomy; identifying missing information, and recommending appropriate taxonomy changes.
- Coordination of disposition decisions and ensuring that decisions are properly documented in DADMS.
- Coordination with Echelon IIs, Central Design Authorities (CDAs), and POCs as appropriate to complete missing questionnaire information in DADMS, initiate and/or accept hand-offs, and process newly added and waived applications in addition to those accepted to the S&T taxonomy.

The contractor shall provide these support efforts in addition to others as requested by the S&T FAM in support of the FAM/FDM effort.

2.3.2 Business Case Analysis (BCA) Execution. The contractor shall help the S&T FAM use the PEO-IT Business Case Analysis (BCA) Filter process on all applications in *approved* and *allowed with restriction* status. The contractor shall coordinate with the S&T FAM to help plan and execute each BCA. Specific support for this task will include:

- Reviewing the initial BCA Filter Group to include identifying hand-offs, applications with insufficient information and identifying POCs and Echelon II owners (Tiger Team members).
- Developing the BCA Filter Plan of Action & Milestones (POA&M), and coordination with the BCA Tiger Team on key dates.
- The review of mandated applications to ensure that the mandate is valid and has not been superseded by new policy, applications, or business processes. Where mandates are not valid, the contractor will coordinate with Echelon IIs, POCs, and CDAs to remove the mandate indication from DADMS.
- Coordination with Echelon IIs, CDAs, Subject Matter Experts (SMEs), the S&T FAM, and Tiger Teams as required for completing each BCA.
- Coordination and facilitation of BCA Filter meetings throughout the BCA Filter process.
- Coordination of BCA Filter training with PEO-IT, as required for the S&T community.
- Review, implement and follow-up on BCA Filter results to ensure implementation in DADMS. Communicate results to the Navy community.

The contractor shall provide these support efforts in addition to others as requested by the S&T FAM in support of the FAM/FDM effort.

2.3.3 Migration Tracking. The contractor shall coordinate with the S&T FAM to develop and execute a Migration Plan tracking process to ensure the actual implementation of BCA decisions. The contractor will coordinate with PEO-IT to facilitate the use of the PEO-IT Migration Planning Guide and Migration Analyzer by the S&T FAM Echelon II community. In addition, the contractor will coordinate with Echelon IIs, CDAs, and Tiger Teams as required to provide guidance for developing and executing migration plans.

2.3.4 FDM Support. The FDM process seeks to identify authoritative databases from which applications draw data. The contractor shall assist in the identification and definition of these sources.

2.3.5 FAM/FDM Coordination. The contractor shall coordinate issues, problems, and inquiries with the S&T FAM as required ensuring that the Legacy Application/Database Rationalization efforts within the S&T community proceed smoothly and without interruption.

2.3.6 Other Agency Coordination. The contractor shall coordinate with other organizations such as the Office of the Secretary of Defense (OSD) as required. Coordination may include facilitating meetings, coordination during Business Case Analysis (BCA) efforts, following up on DoD/Joint level application migrations and/or providing input to S&T FAM reporting.

2.4 Reports Data and Other Deliverables

The contractor will provide the following reports and deliverables.

REPORT/DELIVERABLE	DUE DATE
White papers, technical reports, and presentation materials: The contractor shall provide white papers, technical reports, and presentation materials as required by the Program Manager, in a format mutually agreed upon between the government and contractor.	As required by the Program Manager
Meeting facilitation: The contractor shall attend and actively participate representing the Scientific & Technical (S&T) FAM in Functional Area Management related meetings (to include but not limited to, FAM Lead Working Group, FAM Council, FDM, FNC, Business Case Management, Migration Management, Portfolio Management, and CDA/FAM/Echelon II local conferences).	As required by the Program Manager
Training materials and delivery of training: The contractor shall provide training materials and provide training on FAM, FDM, Portfolio Management (to include Business Case Analysis and Migration Management), Master Record related actions to designated staff and CNR headquarters.	As required by the Program Manager
Draft instructions and directives: The contractor shall provide support to the S&T FAM, coordination and assistance to S&T DoN organizations, Echelon II, III commands, and affiliates on all FAM related actions.	As required by the Program Manager
Bi-Weekly Status Report: The contractor shall provide bi-weekly status reports that include Critical FAM, FDM, Portfolio Management metrics supporting the S&T FAM actions. Contractor format is acceptable.	1 st and 17 th of each month
Monthly Financial Report: The contractor shall provide monthly financial report(s) that include level of effort/hours spent on tasks/projects. Contractor format is acceptable.	10 th of each month
Monthly Status Report: The contractor shall provide monthly status report(s) that include FAM, FDM, Portfolio Management, Master Record metrics, actions, taskings, and all meeting attendance notes/records. Contractor format is acceptable.	10 th of each month

3.0 Personnel Requirements

3.1 Personnel Qualifications

The Contractor shall provide qualified personnel to manage and execute all aspects of the statement of work. The following skill sets are anticipated to support the tasks.

3.1.1 All personnel must be thoroughly familiar and proficient in the use of commercial software packages such as Microsoft Word, Excel, Access and PowerPoint.

3.1.2 Associate Management Specialist/FAM Specialist or Equivalent. A Bachelor's degree from an accredited college or university (or equivalent experience) and one (1) year of experience in DoN FAM/FDM, BCA, and Portfolio Management. The candidate should have excellent skills in business rules, processes, and tools currently being used. Candidate should have demonstrated competence in DADMS, ISF Tools, and FAM BCA programs. The candidate should have the ability to effectively communicate both verbally and in writing.

3.2 Level of Effort

3.2.1 The level of effort has been estimated for the proposed contract. Both a nine (9) month base period and four (4) twelve month option periods have been defined. The total potential period of performance, including options, is 57 months.

3.2.2 Base Period. The base period of performance will be from the date of Order through nine (9) months thereafter. The level of effort anticipated for this period is approximately .75 man-year at an average rate of 166 hours per month. A summary of the labor category and the total anticipated annual hours for this effort is provided below.

Labor Category	Hours Per Year
Associate Management Specialist	1,500

NOTE: 2,000 hours is equivalent to one (1) man-year

3.2.3 Option Periods. The period of performance for each Option Year will be from the date of option exercise through twelve (12) months thereafter. The level of effort anticipated for this period is approximately 1 man-year at an average rate of 166 hours per month. A summary of the labor category and the total anticipated annual hours for this effort is provided below.

Labor Category	Hours Per Year
Associate Management Specialist	2,000

NOTE: 2,000 hours is equivalent to one (1) man-year

3.2.4 The above labor category and hours are provided as the Government's best estimate of the work to be performed. The offeror may propose the same level of effort (hours and labor categories) or a different level of effort based on its own labor classification system and unique approach to satisfy the Government's requirement. While the Government will consider an alternate level of effort, it is the Government's preference to maximize the estimated labor hours devoted to the direct performance of the technical tasks. To the extent that the level of effort proposed is different than the Government's estimate, the

offeror's technical proposal should clearly specify the hours and labor categories proposed for each task in the statement of work.

4.0 Order Details

4.1 Contract Type. The Navy anticipates awarding a cost plus fixed fee level of effort task order.

4.2 Period of Performance. The period of performance for the base period shall be from the date of Order through nine (9) months thereafter. If exercised, the period of performance for each Option Year shall be from the effective date of option exercise through twelve (12) months thereafter.

4.3 Other Direct Costs (ODCs). ODCs (including travel, supplies, etc.) will be reimbursed at cost plus G&A without profit or fee. Purchases of items (other than consumable materials or supplies) exceeding \$2,500 and all travel must be approved in advance by the Contracting Officer's Representative (COR). The total Travel and ODC amount is not to exceed (NTE) \$10,000.00 per year, including G&A.

4.3.1 Travel and Per Diem. Travel will be required to support this Statement of Work. In accordance with the contract requirements, direct costs associated with the Contractor's travel, including per diem, shall not exceed the applicable rates found in the Joint Travel Regulations (JTR). All travel arrangements under the Contractor's responsibility include: clearance requests, hotel accommodations, travel orders, and visa/passport requirements, unless otherwise stated by the Government sponsor. The Government estimate for travel and per diem is \$9,500.00 per year, including G&A.

4.3.2 Other Direct Costs (Other than Travel and Per Diem). ODCs may be required to fully support this task requirement. At this time, the specific items cannot be identified; however, the ODC and Travel cost total cannot exceed the NTE amount stated in Section 4.3. The Government estimate for other direct costs (other than travel and per diem) is \$500.00 per year, including G&A.

4.4 Place of Performance. Work will primarily be performed off-site at the Contractor's facilities.

4.5 Government Furnished Resources (GFR). The Government will provide information, material and forms unique to the Government for supporting the task. The Government furnished resources necessary to perform the statement of work should be identified and requested through the designated Contracting Officer's Representative (COR).

4.5.1 Facilities, Supplies and Services. The facilities required to perform the tasks outlined in the Statement of Work will be at the Contractor's place of business. Basic facilities such as work space and its associated operating requirements (i.e., phones, desks, and utilities) will be provided while working in Government facilities. The availability of any required computer resources while working in Government facilities should be verified in advance with the designated Contracting Officer's Representative (COR).

4.5.2 Information. All Government unique information related to this requirement necessary for Contractor performance will be made available to the Contractor. The Contracting Officer's Representative (COR) will be the point of contact for identification of any required information to be supplied by the Government.

4.5.3 Documentation. All existing documentation relevant to this task's accomplishment will be made available to the Contractor at the beginning of the task. The Contractor will be required to prepare documentation in accordance with defined guidelines provided by the Government.

4.5.4 Equipment. With the exception to the basic facility items noted Subsection 4.5.1, and in accordance with the general guidance in FAR Part 45.102, Contractors are required to furnish all property necessary to perform on Government contracts or orders. PC's should not be proposed as a direct charge under this solicitation. For security purposes, computers may be required to be authorized and approved for use by ONR.

Contractors may be required to obtain one or more Navy Marine Corps Intranet (NMCI) seats to perform the Task Order statement of work. ONR currently plans to formally transition to NMCI on or about 1 OCT 2005. During the performance of the Order, if either party (Government or Contractor) identifies a requirement for the Contractor to obtain an NMCI seat to perform its duties, ONR officials will work with the Contractor to obtain an NMCI seat in a timely manner and, if necessary, will pursue a mutually satisfactory agreement in regards to any formal modifications or changes to the scope, structure or dollar values of the Order as a result of the emerging NMCI requirements. General information regarding NMCI can be obtained at: <http://www.nmci-eds.com/index.asp>.

4.6 Subcontracts/Consultants. Contractor may request or propose, on a case-by-case basis, subcontract/consultant support for specific technical tasks.

4.7 Security Requirements.

a) Clearance Requirements. During the performance of the effort, the Contractor may be required to have access to, and may be required to receive, generate, and store information classified to the level of SECRET. For personnel, a minimum of a SECRET clearance is required. Any Contractor facilities used in support of this contract must be granted SECRET facility clearances and have the capability to store material classified up to and including SECRET. A DD Form 254 will be required prior to access or production of any classified information. Additionally, Contractor is required to safeguard the information labeled as proprietary.

b) Privacy Act. All Contractor personnel assigned to this task will have access to information that may be subject to the Privacy Act of 1974. The Contractor is required to ensure the proper safeguarding of such information to prevent unauthorized release.

c) Nondisclosure Agreement. In the course of its work, the selected Contractor will be required to execute a Nondisclosure Agreements (NDAs) as outlined in Section 5.2.1 of this solicitation.

4.8 Organizational Conflict of Interest

4.8.1 Safeguarding Information

The parties acknowledge that, during performance of the contract resulting from this Order solicitation, the Contractor may require access to certain proprietary and confidential information (whether in its original or derived form) submitted to or produced by the Government. Such information includes, but is not limited to, business practices, proposals, designs, mission or operation concepts, sketches, management policies, cost and operating expense, technical data and trade secrets, proposed Navy budgetary information,

and acquisition planning or acquisition actions, obtained either directly or indirectly as a result of the effort performed on behalf of ONR. The Contractor shall take appropriate steps not only to safeguard such information, but also to prevent disclosure of such information to any party other than the Government. The Contractor agrees to indoctrinate company personnel who will have access to or custody of the information concerning the nature of the confidential terms under which the Government received such information and shall stress that the information shall not be disclosed to any other party or to Contractor personnel who do not need to know the contents thereof for the performance of the contract. Contractor personnel shall also be informed that they shall not engage in any other action, venture, or employment wherein this information will be used for any purpose by any other party.

4.8.2 Organizational Restrictions

Support contractor's knowledge of competition sensitive information, described in paragraph (a) above, may unfairly affect its competitive position in future ONR research solicitations. The Contractor understands that, during performance of the contract resulting from this Order solicitation and for a period of up to two years after the completion of its performance of the contract, the Contractor, any affiliate of the Contractor, any joint venture involving the Contractor, any entity into or with which the Contractor may merge or affiliate, or any other successor or assign of the Contractor may not be eligible to participate as a prime Contractor, subcontractor, consultant, joint venture, partner, or other agreements directly impacted by the S&T FAM/FDM legacy systems/application rationalization, BCA, migration management and Portfolio management research programs.

5.0 Proposal Requirements

5.1 Proposal Format. The Offeror's proposal must be divided into two sections: (1) Technical Proposal, and (2) Cost Proposal. Information for the technical portion shall be in a separate and segregable document from the cost proposal. No cost information shall be in the technical portion. The length of the technical proposal shall not exceed ten (10) pages, exclusive of resumes. There are no page limits on the number of resumes or the pages of the cost proposal. The proposal should be written and organized to be compatible with the Statement of Work, company's organization and accounting structure, and proposed cost.

(a) Technical Proposal: The technical proposal should include the following: The Offeror's understanding of and approach to the requirement, resumes of proposed personnel, and the amount of proposed hours for personnel. The Offeror should describe specifically how the work activities required to complete the tasks in the statement of work will be done. The Offeror should explain how technical objectives, tasks and deadlines will be determined; how staff responsibilities will be assigned; whether and to what degree consultants and/or subcontractors will be utilized; how the quality and timeliness of work performance will be supervised and controlled; how the Offeror will coordinate with the program office; how a surge capacity will be maintained to meet unanticipated requirements; and how administrative tasks such as travel, security and resource requests will be handled.

The Offeror should include information relative to previous efforts for the same or similar services provided in the past to include contract numbers and Government points of contact where applicable.

The Offeror should explain what corporate facilities are available and would be used in support of the work including computer resources, publication/media materials and equipment where appropriate. The proposal should acknowledge that the Contractor will

provide the appropriate IT/telecommunications equipment for the proposed personnel for this task order.

(b) Cost Proposal: The Contractor should submit a cost proposal for the base and option periods indicating the unloaded price per labor hour for the quantities and types of labor proposed. The Contractor should break out the proposed direct labor categories, rates and hours, labor escalation rates, indirect rates (Fringe Benefits, on and off-site Overhead, G&A, Facilities Cost of Money, etc), any consultants/subcontracts, and the indirect rate, if any, to be applied to Travel/ODCs.

If available and applicable, the Contractor should also provide its Defense Contract Audit Agency (DCAA) point of contact, including the Branch Office name, auditor name, phone number and e-mail address.

5.2 Other Required Documents. Offerors should be aware that, upon receiving an award, the following additional documentation will be required:

5.2.1 Non-Disclosure Agreement. Each employee of the successful Offeror will be required to sign a Non-Disclosure Agreement (NDA) prior to commencing work under this Order. The supervisor/manager of the proposed personnel will also be required to sign the NDA on behalf of the Contractor. Attachment A to this solicitation includes the current NDA that should be used, unless otherwise instructed by the Government.

5.3 Proposal Submission. The due date for receipt of proposals for this solicitation is no later than 2:00 PM (Local Time) on Tuesday, 22 March 2005. All forms of proposal submission must include a signed cover sheet. Proposals can be:

(a) Uploaded electronically via the "[Upload Proposals](#)" hyperlink, which is under the hyperlink for this solicitation on ONR's MATOC website (Note: this site restricts the formats of uploaded documents to those in MS Word, MS Excel, or pdf), or

(b) Sent by regular mail (express mail acceptable) or hand delivered. The original and two copies must arrive by the above deadline at the following address:

Office of Naval Research
Attention: Ms. Lynn Christian, Code 0251
800 North Quincy Street, Room 720
Arlington, VA 22217-5660
Ref: MATOC Solicitation Number 05-0002-09

6.0 Evaluation Information

6.1 Evaluation Criteria. A Task Order will be awarded to the responsible offeror whose offer represents the best value to the Government. In order to determine which offeror represents the best overall value, offers for individual task orders will be evaluated on the following Technical and Price/Cost Factors:

Technical Factors

- (1) Proposed personnel
- (2) Management Plan and Technical Approach
- (3) Past performance on earlier tasks under this and similar contracts
- (4) Corporate Facilities

Price/Cost Factors

- (5) Cost

The Government will make a determination of the overall value of each proposal in terms of its potential to best satisfy the needs of the Government, considering both Technical and Cost Factors.

The Offeror's technical capability (as measured by the Technical Factors) and Cost Factor are equal in importance. In regards to the stated Technical Factors, Technical Factor 1 is of the greatest weight; Technical Factors 2 through 3 are equally weighted. Technical Factor 4 is of less value than all other Technical Factors.

In evaluating past performance on individual orders, the procedural requirements in FAR 42.15 are not mandatory. Past performance will be based on the Government's subjective evaluation of the Contractor's performance with previous orders, if any, under this contract and similar contracts.

6.2. Award. The Government will award a task order to the responsible Offeror whose offer conforming to the solicitation will be most advantageous to the Government, cost and other factors considered. The anticipated award and start date of this Order is on or around 08 April 2005.

7.0 Submission of Questions. Any questions regarding this solicitation must be provided in writing to the Point of Contact listed below. Acceptable forms of written question submission include fax and e-mail. Questions submitted less than 72 hours prior to the closing date for proposals may not be answered and the due date for submission of proposals may not be extended.

8.0 Solicitation Amendments. Any amendments to this solicitation will be posted along with the solicitation on the ONR website. It is the Offeror's responsibility to regularly check for any postings of solicitations, amendments, and questions and answers under this or any other MATOC Solicitation.

9.0 Point of Contact. The Point of Contact for this solicitation is Ms. Lynn Christian and she can be reached by e-mail at christl@onr.navy.mil telephone at (703) 696-1575. The secondary point of contact is Mrs. Vera M. Carroll and she can be reached by e-mail at carrolv@onr.navy.mil or telephone at (703) 696-2610.

Non-Disclosure Agreement Regarding Contractor Support for the Office of Naval Research

The undersigned individual, _____, agrees,
both in his personal capacity and as an employee of _____
as follows:

BACKGROUND

1. The mission of the Office of Naval Research is to plan, foster, and encourage scientific research and technology development in recognition of their paramount importance in the maintenance of future naval power and the preservation of national security. ONR provides for the continuing technological superiority of U.S. naval forces, by providing the Department of the Navy (DoN) with mission-relevant, affordable new capabilities that create and exploit scientific breakthroughs, respond to fleet requirements, and support strategic U.S. industries. ONR requires contractor technical services and research support in order to meet these requirements. The services/support that may be provided to ONR by contractor personnel include but are not limited to the following:
 - i. Assist ONR personnel in overall technical program management support on matters and issues consistent with ONR sponsored development projects, including assisting in the evaluation of white papers, proposals, program/project planning, investment reviews, technology assessments, data analyses, conference and seminar activities, and financial issues.
 - ii. Provide support in the financial execution of ONR programs. Monitor availability and use of funds. Review financial documents and plans for impact on program objectives and requirements. Prepare internal financial notices, instructions, guidelines and reports. Conduct analyses and provide reports that identify, quantify and evaluate financial execution of accounts and accomplishment of program goals and milestones. Coordinate preparation and review of actual and projected funding estimates, justifications and strategies. Identify deficiencies, excesses, trends and imbalances to assure funds availability. Work with program personnel to expedite financial execution and ensure programmatic benchmarks are met.
 - iii. Draft analyses, presentations, notes, assessments, testimonies, speeches, and other materials on various technical/management topics, as requested, for use by ONR personnel with other internal ONR departments and externally with the Navy staff, Department of Defense, other federal and state agencies and the U.S. Congress.
 - iv. Provide assistance in the areas of information technology to include database design and maintenance, software development, graphics and reproduction, and other allowable materials and services.
 - v. Provide administrative and management support in the execution of ONR programs to include the preparation of official documents and files for execution by Government employees.

- vi. Provide support on technical, programmatic and operational matters pertaining to the diverse array of technologies investigated and supported by ONR.
2. The undersigned individual is serving as contractor support for ONR. As such, he has and will continue to come into contact with proprietary technical and commercial information. He likewise will have access to sensitive internal information developed by or on behalf of the Government in connection with the accomplishment of ONR's mission.

AGREEMENT

1. The undersigned individual agrees that he will not disclose to any individual, company, or Government Representative¹ any information² relating to current or proposed Navy budgetary information, acquisition planning or acquisition actions, obtained either directly or indirectly as a result of the effort performed on behalf of ONR. The undersigned individual agrees that he will promptly notify the ONR Office of Counsel of any attempt by an individual (including any contractor personnel), company or Government Representative to gain unauthorized access to such information, and of any disclosure of such information to unauthorized parties. Such notification shall include the name and organization, if available, of the individual, company or Government Representative seeking access to such information.
2. The undersigned and his employer acknowledge that the owner of any proprietary information improperly disclosed stands as an intended third-party beneficiary of this non-disclosure agreement. In the event of an unauthorized disclosure of proprietary information, the owner of the information may seek legal recovery under this non-disclosure agreement, even though the information owner is not a formal party to the agreement.

FOR THESE REASONS the undersigned individual agrees on his own behalf, and his employer likewise concurs, to protect, respect and not disclose the proprietary information and Government mission- and procurement-sensitive information that may come to their attention as part of the contract assistance provided to ONR.

Employee Signature _____

Printed Name _____

Date _____

¹ Government Representative is defined as any Government employee, either military or civilian, not assigned to the activity or program office for which the effort is being performed.

² This information includes, but is not limited to, contractor proposals, proprietary data and commercial information, reports and other information in the Government's possession, including information contained in contracts/grants/agreements and associated records and files

Concurrence by the employer:

Supervisor/Manager Signature _____

Printed Name _____

Date _____